

MyCalPAYS Interim Business Process Meeting

June 14, 2012



Welcome & Speakers

- Priscilla Moss
 OCM Manager
- Linda Parsons
 Deployment Manager
- Sarah Justinich
 Communications Manager
- Jennifer Gereghty
 Central/Interim Process Manager
- Christina Vinson Business Manager



Agenda

- Legacy changes to support MyCalPAYS
- MyCalPAYS Interim Business Process Details
- Concurrent Employment
- MyCalPAYS Interim Business Process Binder
- MyCalPAYS Customer Contact Center
- Questions



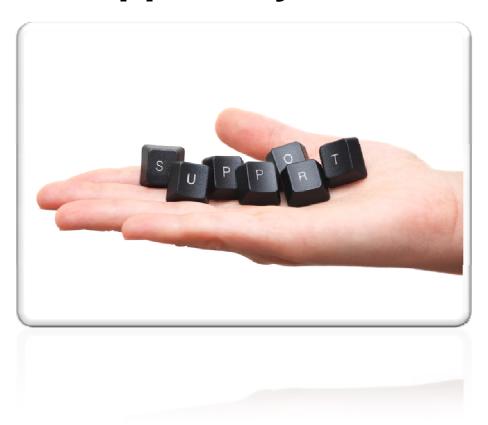


Objectives

- Introduce Legacy system changes to support MyCalPAYS
- Describe the business processes surrounding "Once in MyCalPAYS, Always in MyCalPAYS"
- Provide a foundational understanding of the MyCalPAYS Conversions for Live Departments
- Share information about available resources for MyCalPAYS and non-MyCalPAYS Human Resources personnel to use during the MyCalPAYS 15-month deployment period



Legacy Changes to Support MyCalPAYS



Legacy Changes Overview



- How legacy has prepared for MyCalPAYS
 - Design
 - Conversion process
 - Employment History (EH)/Payroll Changes
 - Online screens

Legacy Changes Design



- Stop Payroll and Employment History transactions for converted employees from conversion period forward
 - SCO PPSD Personnel Letter #12-011
- Data sharing between the Legacy systems and MyCalPAYS
 - Future Personnel Letters to be issued

Legacy Changes Conversion Process



- Stop Pay Flag (Wave number)
- Freeze Period
 - Employment History
 - Payroll
 - CA Leave Accounting System (CLAS)
- Move data from legacy to MyCalPAYS

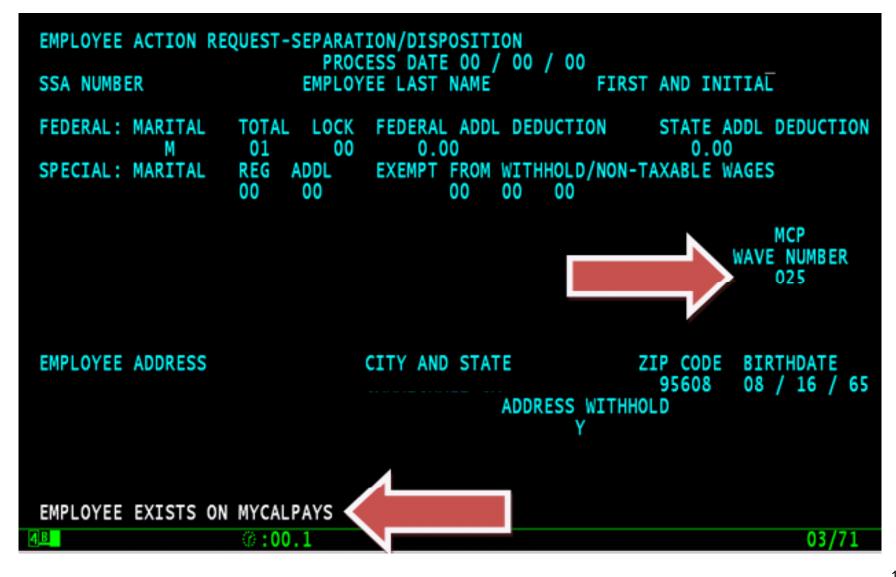
Legacy Changes Stop Pay Flag/MyCalPAYS Wave



- Stop Pay Flag/MyCalPAYS Wave #
 - 3 digit numeric field that identifies employees migrated to MyCalPAYS
 - Assigned by MyCalPAYS per deployment wave
- E06 Transaction (PPSD Use Only)
 - Used to post the Stop Pay Flag

Legacy Changes Stop Pay Flag Example





Legacy Changes E06 Location



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Legacy Changes Payment History Summary



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Legacy Changes Year to Date Detail 2



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                ER-TX-GRS
                          ER-WHELD ER-TX-GRS ER-WHELD
                <----- EMPLOYER MANDATED REPORTING----->
               HLTH BNFT
                           ROTH 401K
                                      ROTH 457B
                                                 ROTH 403B
                  100.10
                             100.20
                                         100.30
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PF1=INQUIRY PF2=SUMMARY PF4=TOTALS PF6=REFRESH PF7=PG UP PF8=PG DN PF10=DET 1
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Questions



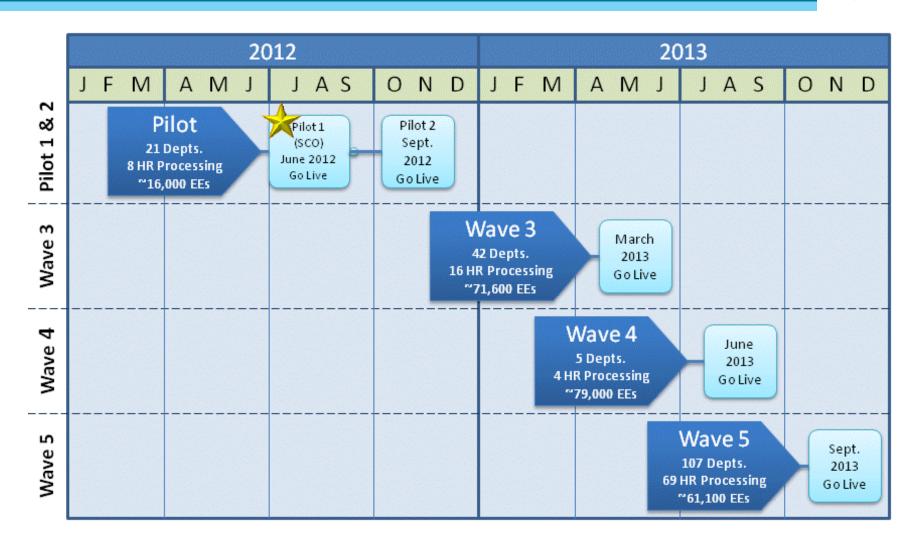


MyCalPAYS Interim Business Process Overview



Interim Business Process MyCalPAYS Deployment Schedule





Interim Business Process Overview



Supports:

- Operation of MyCalPAYS and the Legacy systems during deployment
 - ✓ Until all departments are live on MyCalPAYS (September 2013)

Driven by:

- "Once in MyCalPAYS, Always in MyCalPAYS"
 - ✓ Once an employee has migrated from legacy to MyCalPAYS they remain on MyCalPAYS even if they transfer to a department not yet live on MyCalPAYS
 - CSU (California State University) employees' assignments will remain in legacy

Interim Business Process Scenario Overview



How may departments be affected?

- Any department may be affected during the 15-month MyCalPAYS deployment period (June 2012 – September 2013)
- HR staff may need to:
 - ✓ Identify which system their employee's record is in
 - ✓ Maintain employee records in legacy and MyCalPAYS
 - ✓ Work with the SCO Customer Contact Center (CCC) to maintain employee records

#	Losing Dept.	Receiving Dept.	Description	Impact
1	Non-live	Non-live	Employee action from a department on legacy to one that is on legacy	None
2	Live	Live	Employee transfers from a department live on MyCalPAYS to one that is live on MyCalPAYS	None
3	Live	Non-live	Employee transfers from a department live on MyCalPAYS to one that is on Legacy	Receiving department follows Interim Business Processes
4	Non-live	Live	Employee transfers from a department on legacy to one that is live on MyCalPAYS	Gaining department follows Interim Business Processes

Interim Business Processes Terminology



Interim Business Processes

 The processes defined to assist departments with processing, reporting and tracking employees during the 15-month phased MyCalPAYS deployment schedule (June 2012 – September 2013)

Non-live department

- A department that has not yet migrated to MyCalPAYS
- These departments complete all HR transactions in the Legacy systems

Live department

- A department that has been migrated to MyCalPAYS
- These departments complete all current and future transactions in MyCalPAYS



Commonly Used Terminology

Quarterly Conversion for Live Department

- A portion of the MyCalPAYS conversion process that is used to migrate employee information from legacy to MyCalPAYS at the end of each quarter
- Used for any employee that has transferred, been rehired, or mandatorily reinstated from a non-live department to a live department during the current quarter

Action

Transfer, Rehire or Mandatory Reinstatement

Concurrent Employment

 An employee is concurrently employed if they have two (or more) active assignments in the State



Commonly Used Terminology

Person ID

- Unique identifier that is assigned to each employee in MyCalPAYS
- Retained throughout State career

Personnel Assignment Number (PERNR)

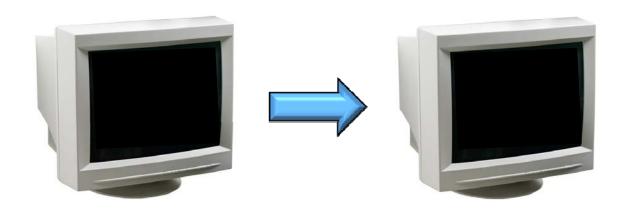
- Unique identifier for each assignment/position
- A concurrently employed person may have multiple personnel assignments

Customer Contact Center (CCC)

- The single point-of-contact for SCO system end user support
- Staffed to support MyCalPAYS users; legacy questions are routed to legacy experts



Interim Business Process Details Scenario #1. Non-Live to Non-Live



Interim Business Processes #1. Non-Live to Non-Live



Description

Employee action from a department on legacy to one that is on legacy

Process to follow:

- Existing legacy process
- Which system is the employee processed in?
 - Legacy
- Who maintains the employee's record?
 - Gaining department in legacy

Reports & Interfaces

- Where does the employee's information come from?
 - ✓ Legacy

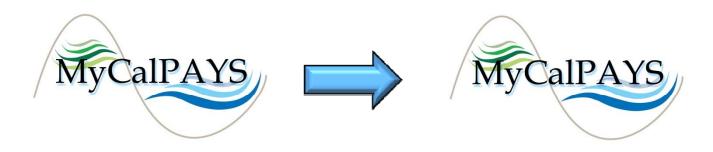
Customer Contact Center Support?

Contact the CCC





Interim Business Process Details Scenario #2. Live to Live



Interim Business Processes #2. Live to Live



Description

 Employee transfers from a department live on MyCalPAYS to one that is live on MyCalPAYS

Process to follow:

New MyCalPAYS processes (MyCalPAYS transfer/release process)

Which system is the employee processed in?

MyCalPAYS

Who maintains the employee's record

Gaining department in MyCalPAYS

Reports & Interfaces

- Where does the employee's information come from?
 - MyCalPAYS

Customer Contact Center support?

Contact the CCC



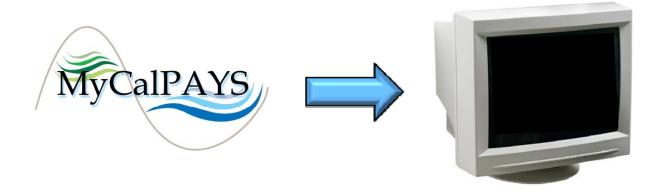


BREAK





Interim Business Process Details Scenario #3. Live to Non-Live



Interim Business Processes #3. Live to Non-Live



Description

 Employee transfers from a department live on MyCalPAYS to one that is on Legacy

Process to follow:

- Interim Business Process, Section B
- Which system is the employee processed in?
 - MyCalPAYS
- Who maintains the employee's record?
 - MyCalPAYS Operations Center via the CCC

Reports & Interfaces

- Where does the employee's information come from?
 - ✓ MyCalPAYS employee(s) from MyCalPAYS; legacy for all others

Customer support?

- Contact the CCC for assistance:
 - ✓ Processing transactions
 - Receiving reports and interfaces for employees in MyCalPAYS



Interim Business Processes #3. Live to Non-Live: Example

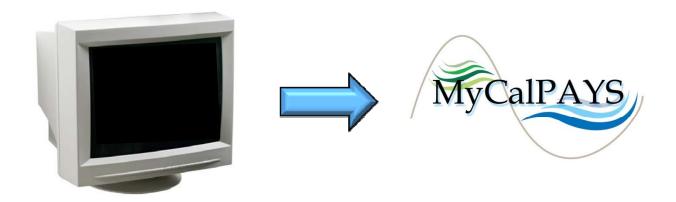


- Scenario: State Controller's Office (SCO) employee transfers to Department of Motor Vehicles (DMV) effective 7/1/2012
 - DMV contacts the CCC to request an Employee History Summary Report and the Person ID
 - DMV completes a padded PAR, the MCP 003 and any other necessary documentation (same as today, EAR, Direct Deposit, etc.) and submits to the CCC
 - CCC creates a Remedy Ticket and sends to the MyCalPAYS Operations Center to process action in MyCalPAYS
 - MyCalPAYS analyst processes action and closes the Remedy Ticket (DMV receives email notification that action has been processed and ticket will be closed)
 - Ongoing employee maintenance, timesheets, address changes, etc., will be sent to the CCC to process





Interim Business Process Details Scenario #4. Non-Live to Live



Interim Business Processes #4. Non-Live to Live



Description

 Employee transfers from a department on legacy to one that is live on MyCalPAYS

Process to follow:

Interim Business Processes, Section C

Which system is the employee processed in?

Legacy until Quarterly Sweep, then MyCalPAYS

Who maintains the employee's record?

The gaining department in legacy until Quarterly Sweep, then MyCalPAYS

Reports Interfaces

- Where does the employee's information come from?
 - ✓ Legacy for employee(s) on legacy, until Quarterly Sweep; MyCalPAYS for all others

Customer support?

- Contact the CCC for assistance:
 - ✓ Processing transactions
 - Receiving reports and interfaces for employees in MyCalPAYS



Interim Business Processes #4. Non-Live to Live: Example



- Scenario: Department of Motor Vehicles (DMV) employee transfers to State Controller's Office (SCO) eff. 7/1/2012
 - DMV will complete the STD. 612 and PAR, like today, and forward to SCO
 - SCO will maintain the employee in legacy until the next Quarterly Sweep in September 2012



Interim Business Process Concurrent Employment



Interim Business Processes Concurrent Employment (CE) Overview



- An employee is concurrently employed if they have two (or more) active assignments in the State
 - Excludes CSU assignments
 - Can be within the same department
- All assignments are migrated to MyCalPAYS when first assignment goes live
 - All employee's pay information is in one system: MyCalPAYS
 - Non-live assignment will be maintained centrally until the department is live
- In MyCalPAYS, each CE assignment has a unique PERNR (personnel number)
- Employee personal data is shared between assignments (e.g., address)
- Assignment-specific data is updated/viewable by department owning that assignment

Interim Business Processes

CE: New Assignments



Use the chart below if your department is live on MyCalPAYS and an employee accepts an assignment with another department

Existing Assignment	New Assignment	Impact
Non-live	Non-live	New assignment is established on legacy and both are processed by their respective departments in legacy
Live	Live	New assignment is established in MyCalPAYS centrally; further processing is completed by the respective departments in MyCalPAYS
Live	Non-live	New assignment is established in MyCalPAYS and maintained by the MyCalPAYS Operations Center; the department on legacy must use the Interim Business Processes described for Scenario #3



MyCalPAYS Interim Business Process Binder



MyCalPAYS Interim Business Process Binder Contents



- Section A: Introduction
- Section B: Live Employee to a Non-Live Department
 - Reference slides for #3: Live to Non-Live
- Section C: Non-Live Employee to a Live Department
 - Reference slides for #4: Non-Live to Live
- Section D: Concurrent Employment
- Section E: Reference Documents
- Section F: Forms
- Section G: Job Aids
- Section H: Reports/Documents

MyCalPAYS Interim Business Process Binder

Forms: MCP 003 – Personnel Action Data Entry



- New form to transmit employee information to CCC
- Used for transfer, concurrent employment, rehire and mandatory reinstatement
- Used similarly to today's PAR
- Some MyCalPAYS verbiage
- Email address is Important

PERSONNEL ACTION MCP 003 (NEW 6/2012)	/8	MyCalPAYS ATTN: MyCalPAYS OPER, 8C0 Personnel-Payroll Bervice Form Contact Info: Tel (916)				
			Email: <u>mopocco@sco.ce</u> Fax: (916) 3754 <u>M — Do NOT Fax or En</u>			
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MyCalPAYS Interim Business Process Binder

Forms: MCP 14 – Direct Deposit Authorization



- Temporary Direct Deposit Form for MyCalPAYS Employees
- Employees can designate more than one bank for direct deposits
- Will eventually become a new standard form

STATE OF CALIFORNIA - STATE CONTROLLERS OFFICE DIRECT DEPOSIT ENROLLMENT AUTH MCP 014 (NEW 6/2012)	HORIZ			ATTN: My SCO Per Form C	sonnel-Payrol Contact Info: 1 Email: <u>m</u> Fa	I Services Tel (916) 3 opoco@so x: (916) 3	Division 372-7200 0.ca.gov 375-6622
COMPLETION INSTRUCTIONS AND PRIVACY NOTICE ARE ON REVERSE OF THE EMPLOYEE COPY. PLEASE TYPE OR USE I POINT PEN – PRINT CAREFULLY.		written notification f	from the e	full force and effect until to mployee of its termination, is it necessary to terminate	or until the Stat		
SECTION A (To be completed by employee)							
TYPE OF ENROLLMENT ACTION		SOCIAL SECURITY NU	JMBER				
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CHANGE COMPLETE SECTIONS A, B, AND D	'	1121		mode	_		
GANGEL COMPLETE SECTIONS A AND D ADD ACCOUNT COMPLETE SECTIONS A AND B	-						
ADD ACCOUNT COMPLETE SECTIONS A AND B							
SECTION B - MAIN BANK (To be completed b	y employe	e if NEW or CHAN	IGE box	in Section A is check	ed)		
TYPE OF ACCOUNT - MUST BE CHECKED IF LEFT BLANK, WILL BE PR	ROCESSED	A5 CHECKING		C (Checking)	S	(Savinç	js)
Verify Routing/Depo							
ROUTING NUMBER (9)		DEPOSITOR ACCOUNT N	NUMBER (1	0)			
FINANCIAL INSTITUTION NAME							
FINANCIAL INSTITUTION ADDRESS Number and Street		City / State			Zip		
I hereby authorize the State Controller's Office to provide for withholding or deductions therefrom, in the above designat	or direct de led account	posit of any salary or i.	wages o	lue me, less any mand:			
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MyCalPAYS Interim Business Process Binder

Job Aids: Actions and Reasons



- Actions/Reasons Work product
- Mapped to today's Legacy Transaction Codes
- This is a reference document to assist in completing the MCP 003

			ACTIONS AN	ID REASONS			
INFO GROUP	ACTION ID	ACTION	STAT 1 (Cust.)	STAT 2 (Empl.)	REASON ID	REASON	Legacy Trans. Codes
					01	List Appointment	A01
					03	Exempt-CCC/Ecology Corps	A35
					05	Exempt-DOM (SAD) Employee	A32
				07	Exempt-DPA	A30	
				09	Exempt-Judicial Council	A33	
				11	Exempt-Reg. Med./Redist. Comm.	A34	
					13	Exempt-SPB Exempt	A32
ZA	ZA ZA New Hire	Active	Active	15	Exempt-Statutory	A31	
				17	Temporary Appointment (TAU)	A01	
				19	CEA Appointment	A01	
					21	Skilled Trades(Casual Employ.)	A01
					23	Emerg. Appt Extreme Emerg.	A02
					25	Emerg. Appt Short Duration	A02
				27	Emerg. Appt Acting Assign.	A02	
					29	Blanketed into State Service	A03
	Add Concurrent ZB ZB Assignment			Active	01	List Appointment	A01
			t Active		03	Exempt-CCC/Ecology Corps	A35
					05	Exempt-DOM (SAD) Employee	A32
					07	Exempt-DPA	A30
					09	Exempt-Judicial Council	A33
					11	Exempt-Reg. Med./Redist. Comm.	A34
					13	Exempt-SPB Exempt	A32
		Add Conquerent			15	Exempt-Statutory	A31
70					17	Temporary Appointment (TAU)	A01
26					21	Skilled Trades(Casual Employ.)	A01
				23	Emerg. Appt Extreme Emerg.	A02	
				25	Emerg. Appt Short Dur. Work	A02	
					27	Emerg. Appt Acting Assign.	A02
					31	Same Class/Same Department	A02
					33	Same Dept./Different Class	A02
					35	Different Dept./Same Class	A02
					37	Different Dept/Different Class	A02
					67	Retired Annuitant	A02



Customer Contact Center





Customer Contact Center

Here to assist you!

- Hours of operation
 - ✓ Monday Friday
 - ✓ 8 a.m. 5 p.m.
- Phone Number:
 - √ (916) 372-7200
- Fax Number:
 - √ (916) 375-6622
- Email:
 - ✓ mcpccc@sco.ca.gov
- Mailing Address:

State Controller's Office

P.O. Box 942850

Sacramento, CA 94250-0001

Attn: MyCalPAYS Business Operations

Customer Contact Center Additional Assistance



Visit the MyCalPAYS webpage for additional resources

- http://www.sco.ca.gov/21century_mycalpays_home.html
 - ✓ Electronic Interim Business Process Binder
 - ✓ MyCalPAYS Wave Deployment Schedule
 - ✓ MyCalPAYS Payroll Calendar
 - ✓ MyCalPAYS forms
 - MCP 003 Personnel Action Data Entry
 - MCP 14 Direct Deposit Authorization
 - MyCalPAYS Paycheck Calculator
 - Available June 22nd



Questions

